

FINAL EVALUATION OF THE  
POLISH SELF-HELP DEVELOPMENT PROGRAM  
WARSAW, POLAND

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## EXECUTIVE SUMMARY

The Polish Self-Help Development Program was developed and implemented by Delphi International under Cooperative Agreement No EUR-0032-A-00-2017-00 funded at \$160,000 by the U S Agency for International Development The grant period was from January 1, 1992 to January 31, 1993

With its goal of improving the overall quality of life for residents of a targeted neighborhood in Warsaw, Poland by addressing basic human needs through the development of self-help groups, the Program initiated five major strategies

- 1 Provide training to local self-help group leaders in skills and knowledge to strengthen their management and organizational capabilities,
- 2 Organize a study tour in the U S to allow the self-help group leaders to observe a variety of approaches and tools used in the U S to deliver community-based social services,
- 3 Encourage the development of cooperative linkages with counterpart organizations met in the U S ,
- 4 Promote activities to increase the level of fund raising to support the services of the local self-help sector, and,
- 5 Create resources for use by other self-help groups in Poland

A final evaluation of the program was conducted in February/March, 1993 to review accomplishments, identify strengths, weaknesses, obstacles to replication and program improvements, assess its impact, and make recommendations regarding program priorities The primary tool of the evaluation was a questionnaire conducted with fourteen randomly selected participants representing thirteen organizations and four key persons involved in the Program's planning and administration in Poland U S AID project specialist from the Warsaw Embassy was interviewed, as were the lead trainer from Delphi International and the staff person responsible for corporate giving at Levi Strauss/Poland All materials pertaining to the Program were reviewed

The concentration of this Program on a specific community has had a positive impact on the provision of needed social services to vulnerable groups The inclusion of both the public sector, as represented by the Ochota Center for Social Assistance, and the nascent private sector of local NGOs promoted much greater coordination of assistance to those in need in Ochota Additionally, the participation of elected officials from the Ochota District Council has contributed to sustained support from scarce local resources for human services Enhancing improved coordination of services was the collective experience of these representatives in the Program, where together they shared information and learned from each other about the needs of

their particular constituents and about the resources each offers. This also contributed to the development of the Ochota Association and its formalization as a registered organization.

The participants overall indicated a much greater level of confidence in administering and guiding their organizations as a result of the skills and knowledge gained from the Program. Twelve of the fourteen respondents to the questionnaire indicated that services to their clients have been improved as a result of the training.

While the seed grants for pilot projects are not yet available, a number of groups have utilized the courses on fund raising and proposal writing to increase their level of support. Proposals are being written to seek funding from sources in Poland, England, Germany and the United States. Other groups are organizing special events and courses to raise funds for their operation. Delphi itself contacted over 80 corporations operating in Poland and 26 U.S. foundations to meet the matching grant requirements of the Program. It is hoped that a proposal prepared by Delphi and the Ochota Association for a Polish foundation will result in the support needed for the pilot projects. Once the seed grants do become available, they will provide an additional source of funding for these groups.

The impetus of receiving these funds has contributed to the formalization of the Ochota Association, an umbrella group of the major organizations addressing social service needs in the neighborhood. This is a significant achievement for two reasons. First, most Polish NGOs resist forming associations due to a strong desire to maintain autonomy and a fear of being subsumed by the larger group. Second, the leaders of the local self-help groups already give a great amount of time and energy to their parent organizations. Devoting work towards building the Association reflects the importance of this effort for those involved.

A number of resources for use by other self-help groups in Poland have resulted from the Program. A significant resource is the experience of the participants. The search for technical assistance by self-help groups is increasing in Poland. Future training programs can refer to the Ochota experience for guidance in identifying the important elements and assisting with the overall design. Several newly trained trainers and Program participants are already serving as important resources by transferring skills learned to others.

The overall acceptance of the training and use of the skills and knowledge presented was very high. Participants were enthusiastic about the training methods used, which incorporated experiential learning and hands-on exercises. Suggestions were made to improve cultural appropriateness, but on the whole, cultural differences did not present a barrier in an understanding of the concepts presented or their use in the work of the organizations represented. Participants most often stated that

more time was needed to process the exercises conducted and to illustrate the concepts presented with Polish examples

Of those interviewed, five Ochota leaders and the local Program coordinator attended the U S Study Tour. They assessed this element enthusiastically, and four of the Polish organizations have developed contacts with U S counterparts. Language difficulties and lack of time to manage these contacts are the main difficulties encountered in broadening exchanges with the U S organizations. The study tour was an inspiration for many, giving them new ideas in addressing similar problems, and renewed confidence that what they already had in place was on the right track. Additionally, it was an important opportunity for the participants and Delphi to work together on developing the content of the training modules.

The major strengths of the program are the inclusion of Program recipients in the planning and evaluation of its elements, involving a native Pole now living in the U S in the training team, the extensive use of experiential learning techniques, the experiences of the study tour and training program on the same group of participants resulting in a greater sense of community purpose among them, and the long-term duration of the Program allowing for greater follow-up on the part of both implementers and participants. The differing expectations relating to the seed grants and the challenge of defining the roles of administrative responsibility and supervision among the main Program sponsors are identified as weaknesses.

No obstacles to replication are identified, but future recipients should be those groups which express a need for this type of training, as opposed to it being requested by a person not involved in Poland's NGO movement. Suggestions for improvements in program elements include greater incorporation of the problems and experiences of Polish NGOs, training more individuals from the same organization to provide mutual support as they introduce some of these new elements into their work, more time for discussion and reflection on the topics presented between trainers and trainees, changes in scheduling and location of training, and, the development of a manual for use by those who cannot attend the training and by indigenous trainers.

Training, involvement of local groups in program design, expanding study tour opportunities for community activists, and the development of more comprehensive Polish language materials in the skills taught are the major recommendations for program priorities.

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## INTRODUCTION AND BACKGROUND

Evidence of the effects of the dramatic political changes taking place in Central and Eastern Europe on the local community level can be found in the burgeoning growth of independent, non-governmental organizations (NGOs). In Poland alone, thousands of grass roots, self-help groups have been registered with the court since 1990. Citizens are taking advantage of this newly-found opportunity to organize in response to a myriad of issues left untended by the former totalitarian government, seeking to address local problems concerning the economy, the environment, the provision of human services and the needs of special populations. However, the initial energy released in the process of establishing these NGOs is soon replaced with more realistic concerns about maintaining organizational viability, practical models of functioning and methods of sustaining financial support. In order to support these groups in the challenging process of building their organizational capacity to continue meeting their goals and purposes, Delphi International developed the Polish Self-Help Development Program (Program) and received funding for its implementation from the U.S. Agency for International Development (USAID). The Program was funded at \$160,000 under Cooperative Agreement No. EUR-0032-A-00-2017-00 for the period of January 1, 1992 to January 31, 1993.

Concentrating its focus on the field of human services, and on one specific neighborhood of Poland's capital city, the Ochota district of Warsaw, the *goal of the Program* was to improve the quality of life for the residents of this area by addressing basic human needs through the development of self-help groups. The *purposes of the Program* were to foster the spirit of self-help and self-reliance through the development of indigenous self-help organizations to distribute needed social services to vulnerable groups, provide leadership and management training to local leaders to improve their capability to provide services to the community, increase the level of fund raising to promote the development of the local self-help sector, and, create resources for use by other self-help groups in Poland.

To achieve the Program's goal and purposes, Delphi undertook the following *implementation strategies*:

- A Ochota local organizational leaders were trained - three training modules were developed to include priority areas of organizational development and management, and the design and implementation of projects.
- B Potential trainers were trained to transfer skills learned to others within and beyond the immediate target community.
- C An Observational Study Tour was held for thirteen self-help group leaders over 14 days in the United States to enable them to meet their U.S. counterparts and to observe a variety of approaches and tools used in the U.S. to provide community-based social services.

D Financial support was planned in the amount of \$15,000 for seed grants to support approximately six (6) projects developed by Ochota self-help groups to address the needs of target service populations, i.e. the elderly, handicapped and disadvantaged children

E Cooperative linkages were facilitated between Ochota groups and counterpart U.S. organizations

Seven (7) *major outputs* were expected as a result of the activities undertaken. These included

- 1 The training of local NGOs in organization and project design and implementation,
- 2 Six pilot projects focused on target populations,
- 3 An observational study tour in the U.S.,
- 4 Development and testing of training materials,
- 5 Provision of quality services for targeted groups such as adults and children with disabilities, the elderly, and severely neglected children and youth,
- 6 Development of long term linkages with U.S. counterpart organizations,
- 7 Case studies of local projects that will stimulate duplication elsewhere <sup>1</sup>

### **Purpose of the Evaluation**

This is the final evaluation of the Program to develop a skills building and management training program for administrators and volunteers involved in local (Ochota) self-help organizations providing social services. The *Scope of Work for the Evaluation* is attached as Appendix 1.

The *goals of the evaluation* are

- 1 To assess how the training modules contributed to meeting the project goal
- 2 To measure the degree to which the program purposes have been addressed

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<sup>1</sup> Goal, purposes, activities and major outputs are taken from the original contract between Delphi International (a.k.a. Delphi Research Assoc.) and USAID, Cooperative Agreement No. EUR-0032-A-00-2017-00, Enclosure 2, pp. 11-12

- 3 To measure the extent to which the training methodologies contributed to accomplishing the purposes and goals of the project
- 4 To judge whether or not the implementation strategies outlined in the proposal and implementation plan were effective

The *Statement of Work* for this evaluation includes

- 1 Review of strategies and activities,
- 2 Review of actual achievements compared with projections,
- 3 Identification of strengths and weaknesses which facilitated or inhibited the accomplishment of project objectives,
- 4 Identification of obstacles which may hinder replication of program in other locations,
- 5 Identification of project elements which could benefit from fine-tuning,
- 6 Assessment of impact to date or potential for impact, and,
- 7 Recommendations regarding project priorities as well as the effectiveness of the implementation plan

## EVALUATION METHODOLOGY

All written materials pertaining to the Program were reviewed by the principal evaluator<sup>2</sup>. These included the original proposal, the Cooperative Agreement, quarterly reports, training and study tour materials prepared for the participants, interim and final evaluations by the participants of the study tour and training sessions, and all correspondence between the staff at Delphi and the Program Coordinator in Ochota.

After this review and discussions with evaluation teammate Mr. John W. Holman, (Director of Central and East European Programs, Delphi International), a questionnaire was developed to guide a structured interview with training program participants. From a list of 35 training participants, 18 persons were randomly chosen for interviews. Four persons could not be interviewed (they either did not show up for scheduled meetings or we were unable to finalize meeting arrangements in the time allotted). Fourteen (14) training participants representing thirteen organizations were interviewed.

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<sup>2</sup> The principal evaluator is fully bilingual in English and Polish.



A second set of interviews was conducted with key persons in Poland involved in the development and implementation of the Program the former Program Coordinator in Ochota, the USAID Project Specialist, the Director of the Ochota Center for Social Assistance, and the Coordinator of the American Committee for Aid to Poland office in Warsaw Additionally, the lead trainer from Delphi was interviewed for an hour via a telephone call to her office in Washington, D C The evaluator also met with staff from Levi Strauss, Inc , one of the U S corporations doing business in Poland which supported Delphi's Program with a \$15,000 grant

The interviews commenced on February 22 and were completed on March 10, 1993, each one of 1 1/2 to 2 hours duration (see Appendix 2 Itinerary of Principal Evaluator) Every person was interviewed separately The interviews were conducted in a conversational manner, and, while the structure of the questionnaire was maintained, great flexibility was allowed to enable the participants to discuss at length their views and ideas about the training Before beginning the questionnaire, the evaluator explained that its purpose was not to test the participant on his/her retention of the information presented, but to determine which parts of the training were most useful to them over the passage of time A list of persons interviewed is attached as Appendix 3

The questionnaire was divided into two parts The first part asked the same set of questions for each topic presented during Module I training "Developing a Community and Its Resources" The purpose of structuring the questions in this manner was to identify the particular tools and skills that are currently being applied in each organization, to determine whether the information presented constituted a new skill or an improvement of an existing skill, to assess whether the skill and its presentation are culturally appropriate, and to ascertain whether the participants feel confident using the skill This last question was posed to obtain some measure of the level of self-reliance among the participants An additional question relating to the particular topic was added at the end of most of the sets

The set of questions asked for each topic were

- 1 How is the training applied in your organization?
- 2 Will an element of the training that is not used now be applied in the future?
- 3 If not, why not?
- 4 Is this a new skill, or an improvement of existing skills?
- 5 Can you use this skill with your organization/community or does its application need to be modified to meet cultural differences? If so, how would you suggest that it be changed?
- 6 What information should be added, increased or deleted?
- 7 After having attended the workshop on this skill, do you feel confident putting it into practice?

The specific topics and their related questions were

- A Community Reconnaissance Getting to know your community and its resources Question Have you utilized a new community resource since taking the workshop?
- B Characteristics, Attributes and Tasks of a Leader Question Using the information provided in this workshop, have you been able to identify possible leaders to become involved in your organization?
- C Creating a Vision and Mobilizing Resources Questions Have you written a mission statement together with other members of your organization? What types of resources have you been able to mobilize since the workshop?
- D Developing an Effective Volunteer Program Question Have you been able to get additional people involved in your organization as volunteers since attending this workshop?
- E Principles of Community Organization Question Have you made any changes in the structure of your organization based on the information received regarding strengths and weaknesses of different organizational structures?
- F Building Partnerships Question Have you been able to use any of the techniques learned in the exercises on conflict resolution and consensus building?
- G Designing and Managing Your Organization's Activities Action Planning
- H Evaluation

Comments were also requested regarding a three hour session on fund raising Module III, Strategic Planning and Program Development, was treated as one topic due to time constraints

The second part of the questionnaire was a series of questions asked to elicit additional information regarding the achievement of Program goal, purposes, success of implementation strategies and completion of major outputs These were

- 8 Who else in your community/organization do you think would benefit from this type of training? Rationale To determine usefulness of training based on referrals of potential participants for future trainings, to determine need for continuing such training
- 9 Have you introduced any improvements into the services you provide your clients/members since attending the training? Rationale To determine whether the training had direct impact on improving service delivery to Ochota residents

- 10 Have you developed any linkages with U S counterpart organizations? Rationale To identify the extent to which one of the purposes and major outputs was achieved
- 11 Do you ever contact your course colleagues for support, advice, to obtain information, or to refer clients to them? Rationale To identify achievement in fostering a sense of self-help and self-reliance in working towards community goals, to determine whether the skills attained can be reinforced and improved upon within the group of trainees
- 12 Are you actively involved in the Ochota Self-Help Association? Rationale To identify achievement in fostering a sense of self-help and self-reliance in working towards community goals
- 13 How would you have changed the training to make it more applicable to the situation of self-help groups in Poland? Rationale To solicit direct suggestions on making the training more culturally appropriate
- 14 Would any of the following assistance be helpful to you in putting into practice the skills acquired during the training? a) more workshops, b) support group, c) manual, d) field trips, e) services of a consultant, f) other Rationale To identify additional supports which would be helpful in maintaining and improving skill levels, to identify aids useful to the participants in future training efforts

Of the fourteen people interviewed, six attended the Training of Trainers sessions. They were asked whether they have provided training, and/or would be willing to do so in the future. They were also asked whether they found the techniques and information presented in the Trainers' workshop useful.

The key persons in Poland were asked to respond to "buzz words" relating to the Program. These were training of trainers, creating resources, fund raising, linkages with counterpart U S organizations, case studies of local projects that will stimulate duplication elsewhere, prevailing strengths and weaknesses related to meeting Program goals, cultural sensitivity, foster a sense of self-reliance, and pertinence to the Ochota community. Presenting the issues in this way allowed the key persons to reflect upon the achievement of goals and purposes without concentrating on only the training Modules, which were the most visible and energy-consuming aspects of the overall Program.

The lead trainer was asked about the training of trainers, the case studies, strengths and weaknesses of the training program, cultural sensitivity, and suggestions that she would have for U S citizens interested in providing similar training in Poland. The Levi Strauss staff person (a Polish citizen) was engaged in a discussion about the interest in and importance to a for-profit corporation in

supporting projects initiated by local self-help groups which meet human service needs

The questions asked of the participants during the evaluation are directly related to the *Key Questions posed in the Scope of Work*. All of them were either repeated verbatim or in a closely related manner

## **FINDINGS AND CONCLUSIONS**

### **I and II                      Review strategies and activities, comparing actual achievements with projections.**

The Polish Self-Help Development Program was designed as a multifaceted and comprehensive approach to strengthen the ability of citizen-based community organizations to meet the human service needs of their constituents. Utilizing strategies of skill building training, the training of trainers, exposure to the operation of community human service organizations in the United States - a country with a long tradition of self-reliance in addressing social problems, facilitating linkages with U S counterpart agencies, and promoting fund raising efforts, the Program has had a lasting and positive impact on the Ochota district of Warsaw

Its concentration on a specific neighborhood required that all pertinent actors in the human service field be included - the public sector, as represented by the Ochota Center for Social Assistance, elected local officials from the District Council, and the private sector, community based NGOs. This has promoted much greater coordination of assistance to those in need in Ochota, enhanced by the opportunity afforded by the Program for these participants to share information about themselves and to work together during the trainings and U S Study Tour. An important outcome for the community has been the formalization of the Ochota Association, an umbrella group of district human service providers

The participants overall indicated a much greater level of confidence in administering and guiding their organizations as a result of the skills and knowledge gained, and stated that services to vulnerable groups have improved. A number of groups are utilizing this new information to increase their level of support, both within Poland and across its borders. A significant resource for self-help groups in Poland is the experience of the participants themselves, who can assist others in developing future training programs, relay their observations from the U S, apply lessons learned, prioritize future needs, as well as provide workshops themselves in a number of the topics presented

The following report presents an evaluation of each element of the Program, based on the findings of the questionnaire and interviews, and offers recommendations to enhance the design of similar efforts for the future

A Training of Ochota local organization leaders Projection of providing three training modules in proposed topics was met, materials were prepared and tested, course content was amended as per suggestions of participants Ability to provide quality services by the organizations represented by the participants has been strengthened and enhanced

1 Modules I and II Developing a Community and Its Resources

This workshop was offered twice in 1992, June 16-19 and September 26-October 3 Several modifications were made to the training syllabus for the second Module based on comments made by participants from the June session The sessions were scheduled from 3 45 to 7 pm on the weekdays, after the workday for most of the participants, and all day on Saturdays A total of 48 community leaders representing 26 organizations attended these Modules

The first part of the evaluation questionnaire deals directly with the topics covered during these Modules All fourteen persons interviewed attended the June training, and six of the same persons repeated the training in September/October The overall reaction of the respondents to the training was very positive Almost all of them stated that the skills learned during the training allowed them to structure what they were doing intuitively, or identify by name the tasks they believed were critical to the operation of their organization With few exceptions, the skills and knowledge conveyed in all of the topics covered are being utilized

They were also very positive about the training techniques used Traditionally, most learning in Poland takes place through lecturing by an expert There is little or no opportunity for input from the participants or opportunities to apply the information conveyed in individual or small group exercises Several of the participants noted their surprise at first at the experiential techniques used, especially with the exercises conducted to promote a more relaxed atmosphere and encourage a better group dynamic However, they soon realized that these techniques helped them retain more of the information which was conveyed, as the learning process was "fun" and required their active engagement at every step

The numerical results of the questionnaire are attached as Appendix 4 The results were tallied by response, and then divided by the eight topics to obtain an average for purposes of the following discussion Not all respondents were able to respond to each question, and in some cases a topic or question may have not been applicable to the particular organization For this reason, not all the numbers may add up to fourteen

When asked how the training is applied to their particular organization, an average of 4 3 respondents stated that the skills are currently being used or have been previously used 5 5 of the respondents were able to give examples of how the skills were being used in their organizations When combining these two results (which were tallied discretely), almost 10 of the fourteen respondents indicated that

the skills gained during the training are being applied in their groups Only 6 gave no examples, while an average of 2 respondents stated that the skill was difficult to use or apply in their organization (Characteristics, Attributes and Tasks of a Leader, Developing an Effective Volunteer Program, and Building Partnerships - all areas emphasizing skills in working with people) Only 6 noted that a particular skill was not yet being used

When looking at the responses by specific topic, one can identify those areas where more training, support or practice may be needed For example, only 6 respondents were able to utilize or provide examples for the session on developing a volunteer program The next lowest number of respondents able to utilize or provide examples for a particular session was 9 - Building Partnerships and Characteristics, Attributes and Tasks of a Leader

Thirteen respondents believed that elements of the training not currently utilized would be applied in the future One person responded that the elements of the training would not be used This particular interviewee was very disappointed in the training, believing that the funds used for the Program would have been better spent providing material assistance to the very poor families that his organization serves During the interview, the evaluator concluded that this person most likely had very different expectations of the training He described how his group had tried two business schemes (allowed by Polish law, and currently one of the few ways for foundations and associations to support their activities) to fund their charitable work which had eventually failed He stated that he was expecting assistance in developing a business plan and specific case studies of successful business enterprises from the U S He was also the only person who disliked the training techniques, calling them "childish "

Were these new skills or an improvement of existing skills? 35 respondents claimed them as new, 77 as improved, 15 as not new However, many of the respondents qualified their response of "improvement" by stating that the workshop provided a structuring of the skill, that it was presented in a new way for them, that it was a "strengthening" of a knowledge base for practice Also, 9 times the answer came back as partly new, partly improved The one session where the response was overwhelmingly "new" was Developing an Effective Volunteer Program - 85 interviewees The next highest "new" came in at 55 - Designing and Managing Your Organization's Activities The response as "not new" averaged between 1 to 3 responses on six of the topics

The responses to the next two questions often overlapped, especially with regard as to how a particular topic should be modified to better meet cultural differences and suggestions for additions Except for the person expressing disappointment with the entire training, no one suggested that any element in the training be deleted As for cultural appropriateness, 825 respondents believed that no modification was necessary, 44 thought otherwise 65 respondents believed that no information should be added or increased, while 575 wanted elements added

Participants suggesting modifications most often referred to a desire to have Polish examples and the Polish context used to illustrate the skills and knowledge conveyed. Regarding the session on Characteristics, Attributes and Tasks of a Leader, it was pointed out by one participant that personal example is a very important quality of a leader in Poland. Another respondent noted the need for the content of this topic to reflect a better understanding on the part of the trainers of Polish conditions - who have been leaders in Poland and what characteristics have contributed to their being perceived as successful leaders. Other participants requested more reference to existing Polish laws and regulations, especially in the areas of bookkeeping, fund raising and the requirements for registering organizations. Another interviewee asked that Polish examples be used to illustrate the application of methods used in the US. The session on Developing an Effective Volunteer Program elicited skepticism as to its applicability in Poland, especially with reference to the great degree of hesitation on the part of many Poles to "formalize" their involvement in an organization due to historical and political reasons (i.e., have their name on a roster, commit to specific days and times). It was suggested that this session concentrate less on the formal aspects of a volunteer program, and more on methods of motivating people to become involved and stay involved.

One of the key persons interviewed remarked that the format of the trainings often superseded content, that more time should be devoted to teaching concrete skills. She also noted that a glossary would have been helpful to clarify in Polish terms used during the training which are difficult to translate directly.

Overwhelmingly, participants wanted more "time" added. Time to practice skills conveyed, time to process the results of exercises conducted during the sessions, time to present more practical examples and to participate in practical exercises to test understanding of and competence in the skills and knowledge presented. The greatest request for additions totalled 7 respondents for the sessions on Evaluation (need for more techniques and practical examples) and Building Partnerships (much more practice in conflict resolution and negotiation skills).

An average of 10.5 responses were positive when interviewees were asked whether they felt confident putting particular skills into practice, while 2.6 responses were negative. The weakest positive response was noted for the session on Evaluation (7 yes, 5 no) and on Building Partnerships (9 yes, 4 no).

The responses to the individual questions pertaining to specific topics were on the whole positive, ranging from between 10 to 12 yeses to 0-3 nos, except for two sessions. When asked if volunteers had been incorporated into their organization since the workshop was attended, 6 respondents stated yes, 5 no, and one "not yet." When asked if any changes had been made in the structure of their organizations based on the information received regarding strengths and weaknesses of different organizational structures, 6 respondents stated yes, 4 said no. In most cases, the negative response to this last question was qualified by an explanation that the

participant's organization is a chapter, or part of a larger organization whose structure cannot be changed, or that the existing structure is too entrenched for change. As to the question on volunteers, one respondent stated that she lacked time to recruit volunteers, several stated that they had volunteers already, and another respondent explained that her clients volunteer to help others in their senior citizen program.

One of the highlights of the June course was a presentation made by a well-known community activist from the United States, Gale Cincotta. Ms. Cincotta, Director of the National Information and Training Center in Chicago, was invited to Poland at the request of Ochota leaders who had met her during their observational study tour of the U.S. In addition to leading part of the session on "How to Get Organized," Ms. Cincotta spoke to an audience of 130 at the Cultural Center in Ochota. There were no questions in the survey asking specifically about Ms. Cincotta's participation. Three of the persons interviewed brought this up in the context of cultural appropriateness, stating that the presentation could have been more helpful had Ms. Cincotta a better understanding of Polish reality. They specifically referred to her suggestions of utilizing church resources to resolve community problems and using demonstrations as a protest tool as being unrealistic in promoting change. However, press coverage of the event was very positive, and the other respondents did not refer to her visit.

## 2 Fund raising

This workshop was a three hour session conducted in July 1992 with 27 participants, at least eleven of whom accompanied the trainer, John Holman, on fund raising visits to corporations in Warsaw. Eight of the 14 persons interviewed on the Module I training attended this workshop. Seven persons found this session to be helpful, and the information presented was new to two of the respondents. Five persons were very pleased with what they got out of this session, and gave a number of examples of their fund raising efforts. One person was not satisfied, and believed that part of her dissatisfaction stemmed from her opinion that the translation was poor. She often felt that not all the information was being conveyed in Polish. Two people questioned some of the cultural appropriateness, with one stating that the emotional approach is often more successful with Poles than a rational one. The second person referred to the traditional Polish method of having to go in person to "take care of business" as opposed to submitting written requests for funds.



### 3 Module III Strategic Planning and Program Development

Module III was held from 14-21 November, 1992, included all the basic elements of program planning and proposal writing,<sup>3</sup> and resulted in a written funding proposal prepared by all the organizations represented during this session. The workshop was targeted to a maximum of 25 people who had already completed the Module I or II training. Nine of the persons interviewed attended this workshop.

Seven of the respondents were extremely positive about this Module. Much of the information contained here was new, and no suggestions were made regarding changes due to cultural differences. One person out of the nine stated her skepticism regarding the possibility of obtaining corporate donations, and another remarked that her current fund raising tactics of utilizing personal contacts sufficed for her organization's needs. The participants were especially gratified by the fact that an entire week was devoted to this topic, and that they were able to build upon the knowledge and techniques acquired during the previous modules. Two of the respondents wished for more time to practice the skills learned, and would have liked a quicker response to the evaluation of the proposals they had prepared.

### 4 Materials

Delphi prepared a notebook for each participant which contained goals and objectives for every major topic, readings (where appropriate), main points and supplementary work sheets which complemented the subjects as presented verbally. They cannot be considered a manual to be used by someone who had not attended the course. One person interviewed noted this directly, while another suggested that the work written up on the newsprint during the workshops be incorporated into the handouts. A "stand alone" manual was not an expected output of this Program. However, lack of sufficient written material makes it difficult to replicate the training by anyone other than Delphi. 6 of the 14 respondents chose a manual as one of the aids to help them practice the skills that were taught.

Study Tour participants received a comprehensive itinerary, which included descriptions of every site visited. These remain very useful in identifying partners for U S /Polish linkages.

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<sup>3</sup>The topics covered were Basics of Strategic Planning. What are our abilities, what should we do, what do we want to do, Goals and Objectives, Putting the Plan into Action, Assumptions and Scheduling, Budget. Income and Expenses, Creating a system to keep the plan on target, and, Looking Towards the Future. Summary and Action Plan.

The case studies of local projects that will stimulate duplication elsewhere were envisioned as a description of those projects supported by the seed grants, which are not yet available

B    Training of Trainers    Projection of training trainers was met with the willingness of two indigenous trainers to conduct workshops, three other non-TOT participants are training within their organizations

Two sessions of trainer training were conducted for the same group of participants, the second session building upon the first. They were held during the same weeks as the Module I and II workshops for two hours after the basic training was completed. The content of these sessions concentrated on the theory of teaching adults (the experiential learning system), the design of a good training session, how to lead group discussions and the application of techniques useful in conducting workshops for adults. The methods used to conduct this training were a mix of mini-lectures and hands-on exercises. Nine persons attended the June session, four of whom continued on in the September/October session. As part of the second session, the participants were asked to co-lead a segment of the Module II workshop with the Delphi trainer.

Six of the fourteen questionnaire respondents attended the first session, with three continuing on in the second. All the respondents believed the training useful, two of the respondents are willing to provide training in some of the areas covered by Modules I and II. One person is actually preparing a training program for Unia Demokratyczna, one of Poland's political parties. Some hesitation was sensed while asking whether the participants would be willing to lead workshops in the subjects presented by Delphi, resulting from a lack of experience in using these skills. When asked if they would be willing to conduct training in a field with which they had extensive experience, based on the skills and techniques presented in the trainers' course, four of them said yes.

Three of the key persons involved in the Program from Poland as well as the lead trainer from Delphi were questioned about this workshop. They were asked if they knew whether any of the participants had conducted training as a result of this course, and were unable to cite examples. One person who participated stated that the training of trainers was not as well prepared as the other Modules, and that the goals of this training were not fully explained nor understood. It seems that some participants were under the impression that this training would include more in-depth information on the topics covered in Module I. Another person noted that participants felt uncomfortable teaching subjects with which they had so little experience, but that they were willing to try with Delphi's support. The Delphi trainer was very impressed with the training conducted by the three participants who agreed to try out their skills during Module II. Two of them expressed a willingness to train others in these skills when asked by the evaluator.

Delphi's efforts to promote transference of skills by local trainers has had some unexpected results. Three of the persons interviewed who did not attend this course are training others in the very skills taught during the Modules. One person is training her staff of social workers, another person is conveying some of these skills to older children residing in the orphanage she directs, and a third person is organizing and conducting workshops with leaders of local chapters of a national organization.

The NGO community in Poland is currently grappling with the issue of who should be trained as a trainer. Those leaders with the most experience in self-help groups are often recruited for trainer programs. Yet, because of their involvement in their work and community, and because their groups are so new, they do not have the time or energy to commit to training others. (Three interviewees stated this as the primary reason for not being able to do training.) Those who do conduct training are often from academia with little practical experience in working at the local level. An additional factor in Poland is the lack of a tradition of job mobility, so that a move from directing an NGO to becoming a "trainer" is not even thought of as a possibility. Nor are "training organizations," as understood in the U.S., very widespread in Poland.

The dilemma of who becomes a trainer will, in time, be resolved, as demand for these skills is increasing along with opportunities for training. One interesting approach to this problem is being proposed by the Polish Foundation for Children and Youth. They are conducting a very similar training program to Ochota's for NGOs working with children and youth. All trainers from abroad have been asked to work with a Polish team mate, to complement each other's skills and experiences and to increase the cadre of Polish trainers.

C     Observational Study Tour of the U.S.     Projection of providing this tour was met with goal of 6 participants expanded to 13 actual participants, major output of long term linkages developed with U.S. counterpart organization met with four of the six organizational representatives interviewed.

Thirteen Ochota leaders took part in a two-week study tour in March 1992 of thirty-six human service organizations in the United States. The agencies were chosen according to the interests expressed by the participants during the planning stages of this trip. Ten persons from the study tour attended the subsequent training program in Poland.

Six persons from the study tour were interviewed, four via the questionnaire, and two during the interviews with key Polish persons. All of the persons interviewed believed that the study tour was an invaluable experience which inspired and guided their work in Poland. They were able to see potential results of their own efforts for the future, meet colleagues working on similar issues in a different country, and learn new ways to address similar problems.

Of five persons interviewed, only one had not established a contact with a counterpart organization in the U S. This question did not pertain to the sixth person, the Polish Coordinator. The most often cited difficulties in maintaining this contact were language barrier and time to attend to the contact. One participant is hoping to set up a Goodwill program with the assistance of that U S organization during their impending trip to Poland. Another contact provided a participant with a critical resource, allowing a self-help book on alcohol addiction to be translated and printed. This book is now in wide distribution throughout Poland. It does not seem that there were any other formal agreements of cooperation negotiated, but participants are staying in touch with the U S groups, and may formalize their relationships through an exchange or training opportunity in the future.

Another effect of this tour cited by one of the participants was its contribution to strengthening a sense of community and cooperation among the leaders once they returned to Poland. The group shared a very important experience, spent time together planning the scope and content of the future trainings with Delphi and reflected together on what they had seen and its applicability to their own work. Upon returning, the group organized two community meetings to present what they had seen and learned, utilizing videotapes taken by one of the participants. The sessions were very well attended (40-45 people) and generated a lot of discussion between the participants and the audience.

The only complaint about the tour pertained to the whirlwind pace and the issue of breadth vs. depth. Some of the participants would have preferred spending more time in those organizations with whom they shared professional interests. When asked what aids would be of benefit in helping the interviewees practice what they learned, 8 of the 14 included field trips in their choices.

D Seed grants to support six projects for a projected amount of \$15,000. This effort is still underway, with a major proposal requesting \$25,000 written for submission to a Polish funding source, mechanism for distributing the grants is being developed.

Delphi has contacted over 80 corporations in Poland and 26 foundations in the United States in an effort to generate funds for both its matching fund requirements to USAID and for seed grants. Levi Strauss made a \$15,000 grant to the Program and \$5,000 was donated by RJR Reynolds, both companies with subsidiaries in Poland. Since November 1992, Ochota leaders and Delphi staff have been working on a proposal requesting \$25,000 from the Stefan Batory Foundation in Warsaw for the seed grants. A new local coordinator for the Ochota Association is working with Delphi to complete this task.

Tandem to this effort has been the formalization of the Ochota Association. This is a significant step for the community and for the organizations involved, as there is great reluctance on the part of Polish NGOs to formalize umbrella groups. NGOs want to maintain their autonomy, and are suspicious of joining inter-

organizational associations in fear being subsumed by the larger organizations. Also significant in the willingness of the Ochota leaders to devote time and energy to an effort beyond the scope of their parent organizations, places where they already are involved almost to the limit of their capacities. Of the fourteen persons interviewed, 10 are actively involved in the Ochota Association.

In order to receive a grant from the Batory Foundation, the Ochota Association has to be formally registered by the Court. This entails writing articles of incorporation, by-laws, electing officers and determining goals and activities. If the Association is not registered, the Ochota leaders as a group could not receive funding. Each NGO would be competing with each other for these funds, and the decision about recipients would be made solely by the Foundation, an outsider to Ochota. An additional benefit of creating the Association is the strengthening of a sense of working together for the good of the whole community.

The fund raising activity conducted by Delphi generated some confusion on the part of Ochota leaders as to the use of the funds raised. After the fund raising workshop, leaders were under the impression that corporations were being contacted to support their local projects. In October, a detailed explanation was provided by Delphi regarding their need to comply with matching fund requirements, and that part of the funds raised were needed for their own expenses of conducting the Program as well as for the seed grants.

Information about target groups for this funding was not identified in the materials reviewed, but founding members of the Association include representatives of organizations working with the physically and mentally challenged, children and youth at risk, and the elderly.

E     Establishment of cooperative linkages between Ochota groups and counterpart U.S. organizations. Four ongoing contacts have been established among the five organizations represented on the U.S. Observational Study Tour which participated in the evaluation interviews.

The one organization with no link would very much like to establish contact with a counterpart organization, but requires linguistic and organizational support. Issues such as timing, readiness to take advantage of such ties, and time to develop concrete programs of cooperation prohibit some participants from currently taking advantage of the contacts they made while in the U.S. With support in planning and translating, more of the groups could possibly develop closer links with U.S. human service agencies. In one case, a contact made in March 1992 is being realized as a proposed joint project one year later. In another organization, the skills obtained during the training contributed very much to a cooperative link with a German counterpart organization. The experience of the study tour may result in the development of more of these contacts in the future.

### **III Identify prevailing strengths and weaknesses which facilitated or inhibited the accomplishment of project objectives**

The Program had a number of strengths which were critical to the achievement of goals and purposes

- o The Program participants, from the U S Observational Study Tour to the Training Modules, were included in the design of the elements eventually implemented Even though all of their requests may not have been met, this gave them a strong sense of involvement in the Program and active participation in identifying their own needs and having them met Evidence of this is in the pre-study tour questionnaires conducted by Delphi, in the involvement of the study tour participants in the design of the training program, in the interim evaluations where participants made suggestions for changes in the training curriculum which were incorporated into Module II Rarely has a group of "experts" from outside of Poland done so much groundwork to tailor its offerings to the needs and requests of the eventual recipients Delphi should be highly commended for this
- o The involvement of a native Pole currently living in the U S on the training team, as a qualitative partner, not just as a translator, was a significant contribution to the success of the Program While it is impossible to ensure 100% cultural compatibility in such a training effort, especially given the unfamiliarity among the Poles with some of the concepts presented, the entire program was enhanced by the ability of Ms Goździak to act as a cultural interpreter to provide a better understanding on the part of the Americans of the needs, reactions and context of the Poles
- o The extensive use of experiential learning techniques was another factor contributing to the success of the Program Not only did participants feel that they retained more, and had fun doing so, but the "ice-breaker" exercises interspersed during the training sessions helped people feel more comfortable with each other and more willing to share their ideas Participants were also able to practice some of what they learned in the classroom before having to apply it with their groups As stated earlier, Poles have had very little experience with these types of learning techniques
- o The combined experiences of the study tour and the training programs promoted group cohesion, which contributed to a greater sense of community among the participants All but one of the respondents questioned is in touch with at least several Program participants for advice, information and support in their work These shared experiences also provided a platform of trust to allow the participants to overcome initial hesitation in forming the Ochota Association Ten of the fourteen interviewees are actively involved in the Association

- o The Program was conducted over an extended time period, which enabled participants to build upon experiences and learned skills. Many training programs conducted by foreign organizations are short-term, one-time events held over a one or two week period, after which the trainers are no longer available to provide follow-up. The longer time involvement is especially important when trainees begin implementing the skills taught and identify those issues requiring clarification or help. The desire for follow-up assistance was clearly indicated by 11 respondents who chose the services of a consultant as an aid to help them put the skills they learned into practice.

Several weaknesses were identified, but they did not substantially hinder the achievement of program purposes.

- o The seed grant funds have not been disbursed. A proposal for \$25,000 is currently under submission with a Polish foundation to fulfill this part of the Program. This missing piece does not seem to have impacted on the ability of the Ochota organizations to continue providing services to targeted populations, but rather leaves unfinished a portion of the training program (written proposal to result in funding) and a key task of the Ochota Association (developing criteria and a decision-making mechanism to choose projects for funding).

One must approach the issue of financial support for Polish groups with great care and sensitivity. Hearing that funds will be available for organizational activities raises expectations in a country where such support is generally scarce. From the outset, the availability of such funds, their source and the manner in which they will be distributed must be clearly explained.

- o As the Program progressed, definition of the roles of the involved sponsors for administrative responsibility and decision-making became confused, resulting in misunderstandings among participants, organizers and staff. Three organizations were involved in decision-making, Delphi, American Committee for Aid to Poland, and the Ochota Association, each with slightly different assumptions as to financial and supervisory oversight, and each operating within a different set of cultural norms relating to these issues. This impacted most keenly on the local coordinator, who was hampered at times in accomplishing tasks needed for Program implementation by a lack of coordination and information-sharing among the three sponsors.

Any project undertaken jointly by several organizations is difficult to coordinate, and the clarification of roles and responsibilities is an ongoing process which takes time and requires flexibility. While problems may have resulted, most were overcome in a manner agreeable to all involved and lessons for the future were learned. It is important to note that many of the strong points of this Program relied to a large extent on the fact that this was a joint project with shared responsibility and decision-making.

#### **IV Identify obstacles which may hinder replication of program in other locations.**

The Program as currently designed has no serious obstacles which would hinder its replication in other locations within Poland. One of the key Polish persons interviewed made a very important observation with regard to the choice of future recipients, however. The program should be replicated for groups which have identified the need for this training themselves, and not conducted at the suggestion of someone unfamiliar with an area or the NGOs operating there. The groups have to be ready for change - for new ideas and new methods of operating. While this entails more time in assessing the need and readiness of the groups proposed for training, the resulting outcome will be enhanced by an agreed-upon assumption of need and the ultimate use of the skills and knowledge taught.

Certainly the lessons learned from the overall experiences regarding administrative responsibility for program implementation, and the issues regarding financial support of local projects should be factored in when replicating the Program elsewhere.

#### **V Identify project elements which could benefit from fine-tuning.**

The training Modules would be improved by

- 1 Greater incorporation of actual Polish case studies and experiences of Polish NGOs to date. These may have been more difficult to identify and weave into the training one year ago, but since then, Polish NGOs have acquired substantial operating experience and encountered issues specific to the cultural and political context within which they work. Incorporating these into the training would significantly enhance the applicability of the techniques and skills taught, and could be accomplished by a one week curriculum preparation trip by the trainers.
- 2 More individuals from the same organizations should attend the training. Several respondents indicated difficulty in applying the knowledge and skills learned because others in their organizations were not familiar with the concepts presented and resisted their use.
- 3 Provide more time for the participants to process their practical exercises and reactions to the content of the training. This would also provide additional feedback to the trainers on cultural appropriateness and opportunities to clarify elements which may have been misunderstood due to language and contextual differences.



- 4 Schedule the training during the day, and, if possible, away from trainees work sites. Most of the training was held after the participants had already put in an eight hour work day. Conducting the Program at a training center, where participants and trainers can live over a period of time, promotes more interaction between the two and provides more time to process the experience as it is occurring.
- 5 More comprehensive materials with illustrative, Polish examples would be very helpful. When the trainers leave, this provides a very useful reference tool for the participants, and can be used as a resource by non-participants and indigenous trainers.

Training of Trainers element should consider carefully the availability of trainees to provide workshops in the future. It might be helpful to target persons for this element who are already conducting workshops in Poland.

Several Study Tour participants would have liked to spend more time with those organizations considered their "service" counterparts. One week of the tour could provide a general overview of U.S. non-profit organizations, while the second week could serve as a "field placement" opportunity for the participants. This would meet the need for gaining depth of experience and also enhance the development and maintenance of long term contacts between the two groups.

## **VI Assess impact to date or potential for impact**

The concentration of this Program on a specific community has had a positive impact on the provision of needed social services to vulnerable groups. The inclusion of both the public sector, as represented by the Ochota Center for Social Assistance, and the nascent private sector of local NGOs contributed to a greater degree of service coordination to those in need in Ochota. Additionally, the inclusion of elected officials from the Ochota District Council has promoted sustained support from scarce local resources for human services. The improved coordination of services was enhanced by the fact that representatives of these groups experienced this Program together, shared information and learned from each other about the needs of their particular constituents and about the resources each can offer. This shared experience also promoted the development of the Ochota Association and its formalization as a registered organization.

The participants overall indicated a much greater level of confidence in administering and guiding their organizations as a result of the skills and knowledge gained from the Program. Twelve of the fourteen respondents to the questionnaire indicated that services to their clients have been improved as a result of the training.

While the seed grants which would have increased the level of fund raising are not yet available, a number of groups have utilized the techniques and skills learned

during the Program to increase their level of support. Proposal writing skills are being used to seek funding from sources in Poland, England, Germany and the United States. Other groups are organizing local special events and courses to raise funds for their operation. Once the seed grants do become available, they will provide an additional source of funding for these groups.

A number of resources for use by other self-help groups in Poland have resulted from the Program. A significant resource is the experience of the participants. The search for technical assistance by self-help groups is increasing in Poland. Future training programs can refer to the Ochota experience for guidance in identifying the important elements and assisting with the overall design. Several newly trained trainers and Program participants are already serving as important resources through the training that they are providing.

## **VII. Recommendations for Program Priorities**

Training should continue to be a priority of the Program, utilizing the Modules developed, building upon the experiences gained during implementation and incorporating the suggestions for changes made by the participants. Several NGOs are currently operating in Poland for the purpose of supporting the development of local self-help groups. They can be significant partners in the replication of the Program by identifying appropriate groups and/or regions for training, in identifying persons to receive trainer training and to provide consultation in designing the materials to better reflect local issues and context. They can also be helpful in providing Polish trainers for some of the elements of the Modules, especially those that deal with interactive skills. These groups are often aware of other NGO support efforts at local, regional and national levels, and should be involved in developing a coordinated approach in this field.

Local groups should continue to be involved in program design, especially during the needs assessment phase. Some aspects of the Modules may be more appropriate than others for a specific region. The involvement of Ochota leaders in Program development was an important strength which increased their commitment to the Program. This requires that the lead trainer make a pre-training visit to acquire information for incorporation into the workshops.

Study Tour opportunities are important in generating new ideas and observing different methods of addressing shared problems. While an expensive component of the Program, such opportunities should be made available to local community activists and NGO leaders. Currently, most resources in Poland for exchanges are targeted to highly skilled professionals and academicians. Human service organizations in the U.S. and Western Europe are often quite willing to work with counterpart organizations in skill and information sharing. Opportunities for this type of exchange should be increased.

Polish language materials on organizational development and management for NGOs are in great need. An operating manual would be most helpful, not only as an aid to NGO leaders, but also as a reference tool for local trainers.

## **APPENDIX 1**

### **Scope of Work for the Evaluation**

## Scope of Work

### I Title

Polish Self-Help Development Program, Warsaw, Poland

### II Background

This project is funded at \$160,000  
Cooperative Agreement No EUR-0032-A-00-2017-00  
Grant period January 1, 1992 - January 31, 1993

### III Purpose of Evaluation

The evaluation is to be seen as the final evaluation of the pilot program to develop a skills building and management training program for administrators and volunteers involved in local (Ochota) grassroots organizations providing social services

The goals of the evaluation are

A To assess how the training modules contributed to meeting the project goal "to improve the overall quality of life for the residents of the Ochota district by addressing basic human needs through the development of self-help groups "

B To measure the degree to which the program purpose has been addressed, that purpose being to foster the spirit of self-help and self-reliance through the development of indigenous self-help organizations to distribute needed social services to vulnerable groups, to provide leadership and management training to local leaders to improve their capability to provide services to the community, to increase the level of fund raising to promote the development of the local self-help sector, and to create resources for use by other self-help groups in Poland

C To measure the extent to which the training methodologies used contributed to accomplishing the purpose and goals of the project

## STATEMENT OF WORK

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D To judge whether or not the implementation strategies outlined in the proposal and implementation plan were effective

### IV Statement of Work

- 1 Review strategies and activities
- 2 Review actual achievements compared with projections
- 3 Identify prevailing strengths and weaknesses which facilitated or inhibited the accomplishment of project objectives
- 4 Identify obstacles which may hinder replication of program in other locations
- 5 Identify project elements which could benefit from fine-tuning
- 6 Assess impact to date or potential for impact
- 7 Provide recommendations with respect to project priorities as well as the effectiveness of the implementation plan

### V Key Questions

#### Outcome

- 1 How is the training applied in each local organization?
- 2 What part of the training is applied and what will be in the future?
- 3 Of the skills training presented, what represented new skills and what part improved existing skills?
- 4 Was training for trainers useful and effective? Do trainees feel better qualified to act as group leaders/facilitators?

#### Process

- 1 Was training culturally sensitive?
- 2 Were methodologies applicable to fostering the spirit of self-reliance?
- 3 Were technical concepts clear and understandable?
- 4 Was course content pertinent to situation in Ochota?
- 5 What information should be added, increased or deleted?

### VI Composition of Evaluation Team

Principal evaluator Barbara Przybylska received her MSW from Boston University in 1980 and has worked with a variety of social service agencies in Massachusetts including the Polish Social-Cultural Association in South Boston. In 1992 she worked with the training department of the Ministry of Labor and Social Policy in Warsaw as a UN volunteer. She is

## STATEMENT OF WORK

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currently working with BORIS an NGO providing legal advice and technical assistance to newly formed self-help groups in Warsaw Barbara speaks fluent Polish

Delphi staff John Holman is the Director of Central and East European Programs at Delphi and has been administering this project since its inception John has been working with non-profit agencies for more than twenty years, principally in the areas of fundraising and development

### VII Schedule

Two weeks are scheduled and budgeted to conduct necessary interviews in Poland and complete report Evaluation will begin February 16, 1993 Final draft of report is due on or before March 3, 1993

### VIII Methodology

- 1 Review appropriate written materials
  - Project proposal
  - Grant agreement
  - Implementation plan
  - Quarterly reports
  - Written questionnaires

#### Methodology (cont )

- 2 Interview as many program participants as possible, randomly selected
- 3 Interview other individuals and representatives of organizations that contribute to or benefit from the program (ACAP, Ochota Gmina, Peace Corps, AID Mission, donors)

### IX Evaluation Report

Report should be concise, to the point and should not exceed 15 single spaced, typewritten pages Report format should be

Title page  
Executive Summary  
Table of Contents  
Main report (organized in accordance with list of evaluation questions provided in Section V of this SOW )  
Lessons Learned

## APPENDIX 2

### Itinerary of Principal Evaluator

All meetings and interviews were held in Warsaw, Poland

February 15, 1993	Meeting with John W Holman
February 15-21	Review of Program materials, design of questionnaire, interview scheduling
February 22	Interview - Barbara Chojnacka
February 23	Interviews - Krzysztof Garbarski (no show) - Hanna Bartoszewicz - Dorota Ostapiuk Meeting with John W Holman
February 24	Interviews - Magdalena Skaradzinska - Anna Rajner
February 25	Interviews - Zbigniew Tyszek - Maria Matuszynska (no show) Meeting with Małgorzata Zachorowska, Levi Strauss with John W Holman
February 26	Interviews - Ireneusz Myśliwczyk - Zofia Rubini
March 1	Interviews - Ija Ostrowska - Beata Łyskawa
March 2	Interviews - Bogusława Biedrzycka - Joanna Jurek - Izabella Dobieszewska
March 3	Interview - Hanna Bartoszewicz
March 4	Interviews - Aniela Zmysłowska - Monika Kurpiel
March 8	Interview - Barbara Ciesielska
March 10	Interview - Andrzej Nagiel

### APPENDIX 3

#### Individuals Contacted During the Evaluation

- 1 Hanna Bartoszewicz, Program Coordinator (1991-1992)  
Polish Self-Help Development Program, Warsaw, Poland
- 2 Joanna Jurek, Coordinator  
American Committee for Aid to Poland, Warsaw Office
- 3 Ija Ostrowska, Director  
Center for Social Assistance, Ochota District, Warsaw
- 4 Elzbieta Samplawska, Project Specialist  
U S Agency for International Development, Warsaw, Poland
- 5 Janet Kerley, Lead Trainer  
Delphi International, Washington, D C , U S A
- 6 Małgorzata Zachorowska, Personnel Manager  
Małgorzata Gołębiewska, Assistant to Personnel Manager  
Levi Strauss, Warsaw, Poland
- 7 Bogusława Biedrzycka, Head of Social Work Department  
Center for Social Assistance, Ochota District, Warsaw
- 8 Barbara Chojnacka, Director  
Children's Orphanage #9, Ochota District, Warsaw
- 9 Barbara Ciesielska, Director  
Independent Self-Governing Trade Union "Solidarność"  
Warsaw/Ochota District Committee  
Committee on Retired and Disabled Persons,  
Founding member, Ochota Association
- 10 Izabella Dobieszewska, Chairperson  
Ochota District Council (local elected governmental body)
- 11 Monika Kurpiel, Coordinator  
Children's Center Program, The Family Alliance of St Jacob's Parish, Ochota



- 12 Beata Łyskawa, Assistant Director  
Center for Social Assistance, Ochota District, Warsaw
- 13 Ireneusz Myśliwczyk, Board Member  
SOS Foundation of Okęcie in the Ochota District
- 14 Andrzej Nagiel, President, "Crocus" Sobriety Club  
Chairperson, Warsaw Chapter of Sobriety Clubs of Poland, Founding member,  
Ochota Association
- 15 Dorota Ostapiuk, President  
Warsaw Chapter of the Catholic Association of Persons with Disabilities,  
Founding member, Ochota Association
- 16 Anna Rajner, Chairperson, The Mokotów Fund to Help the Weakest at the  
Synopsis Foundation, Councillor, Mokotów District Council, Warsaw, Founding  
member, Ochota Association
- 17 Zofia Rubini, Founder, The Olszynka Assistance Information Bank, member,  
"Solidarność" Citizens' Committee for South Praga District, Warsaw, Editor,  
Olszynka - The Newspaper for the South Praga District, Founding member,  
Ochota Association
- 18 Magdalena Skaradzińska, Initiator  
Parents' Group of Disabled Children, Integration School,  
Founding member, Ochota Association
- 19 Zbigniew Tyszko, Vice-Chairperson of the Board  
"Solidarność" Citizens' Committee for the Ochota District
- 20 Aniela Zmysłowska, Gerontologist and Physician  
Coordinator of Geriatric Care at three Ochota Day Centers for Senior Citizens,  
Founding member, Ochota Association

## APPENDIX 4

### Ochota Project Evaluation Questionnaire for Training Participants

Name  
Organization  
Position in Organization

Participated in U S Study Tour      4 yes      10 no

Attended Trainer's Workshop      6 yes      8 no

Workshops Attended	Module I - June 1992	14 participants
	Module II - Sept/Oct 1992	6 participants
	Fund raising - July 1992	8 participants
	Module III - November 1992	9 participants

Of the fourteen persons questioned, 3 attended only one workshop, 3 attended two workshops, 4 attended three workshops, and 4 attended all the workshops offered

#### Questions asked of each workshop session

- 1 How is the training applied in your organization?
- 2 Will an element of the training that is not used now be applied in the future?
- 3 If not, why not?
- 4 Is this a new skill, or an improvement of existing skills?
- 5 Can you use this skill with your organization/community or does its application need to be modified to meet cultural differences? If so, how would you suggest it be changed?
- 6 What information should be added, increased or deleted?
- 7 After having attended the workshop on this skill, do you feel confident in putting it into practice?

#### Workshop Sessions

A Community Reconnaissance Getting to know your community and its resources  
*Poznanawanie swojej społeczności i jej zasobow*

- |   |    |                        |   |            |   |
|---|----|------------------------|---|------------|---|
| 1 Used/Previously used                                | 7  | Gave example           | 5 | No example | 0 |
| 2 Yes   | 13 | No                     | 1 |            |   |
| 3 Found training not useful for needs of organization | 1  |                        |   |            |   |
| 4 New   | 1  | Improvement            | 9 | Not new    | 3 |
| 5 No modification                                     | 9  | Modification suggested | 3 |            |   |
| 6 Right amount of information                         | 8  | Add                    | 5 | Delete     | 0 |
| 7 Yes   | 12 | No                     | 0 |            |   |

Have you utilized a new community resource since taking the workshop?  
Yes 10      No 2

Name

**B Characteristics, Attributes and Tasks of a Leader**  
*Charakterystyka, przymioty i zadania przywódcy*

- 1 Used/Previously used 6 Gave example 3 Difficult to use 4
- 2 Yes 13 No 1
- 3 Found training not useful for needs of organization 1
- 4 New 1 1/2 Improvement 9 1/2 Not new 2
- 5 No modification 7 Modification suggested 6
- 6 Right amount of information 7 Add 5 Delete 0
- 7 Yes 12 No 2

Using the information provided in this workshop, have you been able to identify possible leaders to become involved in your organization?

Yes 8 No 0

**C Creating a Vision and Mobilizing Resources**  
*Mobilizacja zasobów i środków, tworzenie i przekazywanie misji*

- 1 Used/Previously used 5 Gave example 5 No example 1 N/A 1
- 2 Yes 13 No 1
- 3 Found training not useful for needs of organization 1
- 4 New 4 Improvement 6 Not new 2
- 5 No modification 11 Modification suggested 1
- 6 Right amount of information 6 Add 5 Delete 0
- 7 Yes 11 No 2

Have you written a mission statement together with other members of your organization?

Yes 9 No 3

What types of resources have you been able to mobilize since the workshop?

Funds, church involvement, new program, events, cooperation with local officials

**D Developing an Effective Volunteer Program**  
*Tworzenie skutecznego programu ochotniczego*

- 1 Used/Previously used 3 Gave example 3 No example 1 Difficult to use 5  
For future use 1
- 2 Yes 13 No 1
- 3 Found training not useful for needs of organization 1
- 4 New 8 1/2 Improvement 3 1/2 Not new 1
- 5 No modification 6 Modification suggested 6
- 6 Right amount of information 7 Add 6 Delete 0
- 7 Yes 10 No 3

Have you been able to get additional people involved in your organization as volunteers since attending this workshop?

Yes 6 No 5 Not yet 1

Name

E Principles of Community Organization  
*Jak się zorganizować*

- 1 Used/Previously used 5 Gave example 5 No example 1 Not used yet 2  
2 Yes 13 No 1  
3 Found training not useful for needs of organization 1  
4 New 2 1/2 Improvement 7 1/2 Not new 3  
5 No modification 8 Modification suggested 5  
6 Right amount of information 6 Add 6 Delete 0  
7 Yes 11 No 2

Have you made any changes in the structure of your organization based on the information received regarding strengths and weaknesses of different organizational structures?  
Yes 10 No 4

F Building Partnerships  
*Budowanie Partnerstw*

- 1 Used/Previously used 1 Gave example 8 No example 1 Difficult to use 3  
2 Yes 13 No 1  
3 Found training not useful for needs of organization 1  
4 New 1 1/2 Improvement 11 1/2 Not new 0  
5 No modification 7 Modification suggested 6  
6 Right amount of information 6 Add 7 Delete 0  
7 Yes 9 No 4

Have you been able to use any of the techniques learned in the exercises on conflict resolution and consensus building? (rozwiązywanie konfliktów i budowanie porozumienia)  
Yes 10 No 3

G Designing and Managing Your Organization's Activities Action Planning (and budgeting/accounting)  
*Projektowanie i zarządzanie działalnością swojej organizacji (tworzenie budżetu / księgowosc)*

- 1 Used/Previously used 5 Gave example 8 No example 0  
2 Yes 13 No 1  
3 Found training not useful for needs of organization 1  
4 New 5 1/2 Improvement 7 1/2 Not new 0  
5 No modification 10 Modification suggested 4  
6 Right amount of information 8 Add 5 Delete 0  
7 Yes 12 No 1

H Evaluation  
*Ocena*

- 1 Used/Previously used 3 Gave example 7 No example 1 Difficult to use 1  
Not used yet 1

Name

2 Yes 13 No 1  
3 Found training not useful for needs of organization 1  
4 New 4 Improvement 7 Not new 1  
5 No modification 8 Modification suggested 4  
6 Right amount of information 4 Add 7 Delete 0  
7 Yes 7 No 5

I Fundraising (July 1992)  
*Zbieranie funduszy*

No Attended 8  
New Information 2 Not new 4  
Helpful 7 Not helpful 2

J Strategic Planning and Program Development (14-22 Nov 1992)  
*Planowanie Strategiczne i Projektowanie Programow*

No Attended 9  
New Information 6 Not new 2  
Helpful 8 Not helpful 0  
Used 9 Not used 0

8 Who else in your community/organization do you think would benefit from this type of training?

Named future recipients 12  
No one 1  
Could not find a future recipient 1

9 Have you introduced any improvements into the services you provide your clients/members since attending the training?

Yes 12 No 2

10 Have you developed any linkages with U S counterpart organizations?

Persons on Study Tour Yes 4 No 1  
Non-Study Tour respondents Yes 1 No 8  
Contact in another country Yes 1

11 Do you ever contact your course colleagues for support, advice, to obtain information, or to refer clients to them?

Yes 12 No 2

12 Are you actively involved in the Ochota Self-Help Association?

Yes 10 No 4

Name

- 13 How would you have changed the training to make it more applicable to the situation of self-help groups in Poland?

See Findings and Conclusions section of evaluation report

- 14 Would any of the following assistance be helpful to you in putting into practice the skills acquired during the training?

<u>10</u>	more workshops	<i>dodatkowe szkolenia</i>
<u>5</u>	support group	<i>grupa wsparcia</i>
<u>6</u>	manual	<i>podręcznik</i>
<u>8</u>	field trips	<i>wyjazdy</i>
<u>11</u>	consultant	<i>usługi konsultanta</i>
<u>1</u>	other	<i>inne A Center containing all of the above elements</i>

## **APPENDIX 5**

### **Lessons Learned Review by Delphi Staff**

**John W Holman  
Janet Kerley  
Elzbieta Goździak**

## LESSONS LEARNED FROM THE OCHOTA PROJECT

### **I Collaboration with Local Counterparts**

The most critical step in project implementation is establishing good working relationships with the counterpart organizations at the beginning of the project. The working relationships with the personnel of the Association were excellent, having been established on a number of occasions, with Delphi personnel in Warsaw and during the study tour in the United States.

- ◆ There were unrealistic expectations about the availability of some resources for the training course however, and the knowledge needed on the part of the coordinator of the Association to recruit the trainees, select the training site and prepare for the training program. A more targeted recruitment effort, assisted by the U S counterpart, would have eliminated some people who were inappropriately selected. For instance, some organizations sent three or four people, while more time spent in the initial recruitment phase, would have increased the number of organizations represented, and fewer people from the same group. (At the same time, Delphi recognizes the ideal number of people from an organization is two, so that after the training and upon their return to the workplace, each has a support person to help explain newly learned theory and practice to their colleagues.) In the proposal-writing course, people came who were not responsible for that task in their organization. An additional trip prior to the first course with the objective of providing technical assistance in these areas would have provided the necessary instruction that can not be done by fax.

### **II Logistics**

- ◆ Schedule the training during the day and, if at all possible, away from the trainees' work-site. The Ochota training was held in the late afternoon, after most of the trainees had finished an eight hour work day. An additional three hours of training after a full work-day requires a major effort on the trainees part, which they willingly contributed, but the trainers were constantly fighting the fatigue factor.
- ◆ Whenever possible, the training team should work directly with participants in the logistical planning and preparations for the daily training sessions, if not their actual conduct. This approach is in keeping with experiential methods of adult learning and is an added enhancement to the daily lectures and exercises. Involving participants, on a voluntary basis, in fundraising efforts proved to be a very popular idea and a useful experience in overcoming natural personal anxieties and cultural resistance to the process of solicitation of gifts. It should be noted, however, that it is very important that all parties have a common understanding and agreement on the purpose and use of funds raised.



- ♦ The matching requirements of this grant required a tremendous amount of staff time, energy and money that would otherwise have been devoted to program delivery and quality control

### III Training Methodology

- ♦ The training course used the experiential learning cycle as the model for preparing each of the training modules. This model emphasizes learning by doing, so that the trainees are invited to engage in exercises, group work, simulations, role-plays, etc. in an active approach to learning. This method has not been widely used in adult education programs in Poland and the training team, especially the Polish counterparts, anticipated resistance from the trainees,

The training team was quite surprised at how easily the group received the new methodology

The Polish co-trainer, herself, was surprised at how quickly the group adapted to this new learning style

- ♦ A second feature of the training, the use of an experienced practitioner as a resource during the training program was extremely useful, for a number of reasons. Her willingness to contribute her time, pro bono, for a week in Poland was proof in practice of the theory expounded in the module on volunteerism. The richness of her lifetime of on-the-ground experiences added invaluable depth to the community organizing portion of the program

The choice of the practitioner invited was dictated by the desires of the study tour participants who had met her in Chicago during their initial visit and the match between Ms. Cincotta's extensive experience in community organizing and the focus of the course on the role of community groups in mobilizing people to help themselves was good. In the future, Delphi will engage in a wider search for practitioners who can contribute practical skills in other areas specified by the Polish self-help groups

- ♦ The nature of the training methodology, participatory and experiential by design, dictates smaller class sizes to ensure in-depth skill building. The average size of the training groups was over 25-28 people, more than the 20 which is an ideal size

### IV Training Team

The training course was designed and taught by a two person training team, comprised of an American sociologist with extensive training experience and a Polish trained anthropologist with ten years of American university and non-profit work experience

Two important lessons were learned

- ◆ First, given the intensive nature of the training program, which was highly experiential, two trainers are needed in order to avoid trainer fatigue
- ◆ Secondly, the bi-cultural nature of the team provided a richness in training methodology, substantive content, and cultural understanding that could not be found in a team with either piece missing

## V Content of the Training Course

- ◆ The content of the courses was planned in direct cooperation with the participants of the study tour both while they were in the United States, and with the larger group which met with study tour participants upon their return. This was a critically important step in assuring that the material was directed to their needs and that the final course was seen as a joint project, not imposed by the American organization

This process requires more time in the needs assessment and curriculum design stages, but ensures that the implementation of the course is smooth

- ◆ An ideal design process would include creation of an advisory council on the issues relating to the project, to provide access to the latest research in the field on the themes being presented in the training program
- ◆ It would have been good to include funds in the project to allow for the creation of a finished and polished training manual to be produced which would include the materials, charts, graphs, etc. as actually used, since the course materials were constantly shifted or adjusted to the environment and the perceived needs of the participants
- ◆ It also would have been very helpful to have half a dozen laptop computers or their equivalent available for those who were computer literate so additional coursework could have included information systems and use of the computer as a management tool

## APPENDIX 6

### Qualifications of Principal Evaluator

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Barbara Przybylska received a Master's Degree in Social Work from Boston University in 1980, specializing in Community Organization, Management and Planning. She has worked in a number of human service non-profit organizations in Boston, directing her skills towards program development, fund raising, staff supervision, advocacy and services to clients. Before leaving for Poland, she was director and founding member of the Polish Social Cultural Association, a human service organization working to resettle Polish emigres in Boston and develop organizational management skills in the refugee community.

Her professional experience, knowledge of the Polish language and familiarity with its history and culture led her to Poland in 1991 where she worked as a consultant to the Training Department of Poland's Ministry of Labor and Social Policy, in its effort to develop a new training curriculum for that country's social work schools. In October 1992, she joined a Polish NGO - The Support Office for the Movement of Self-Help Initiatives (BORIS - Biuro Obsługi Ruchu Inicjatyw Samopomocowych). Her responsibilities there include training and technical assistance to strengthen program development, managerial and fund raising skills of self-help groups working in the field of social services. Her work in Poland is supported by the United Nations Development Program for Poland as a U N Volunteer.

Ms Przybylska conducted a mid-term evaluation of training Module I for the Polish Self-Help Development Program, but has otherwise not been involved in the Program.